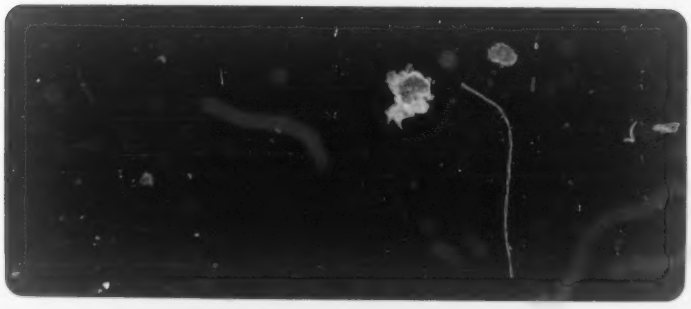
Research Report



Newspaper Readership Project

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NEWSPAPER PAGES, ADS & READERS

This study is one of a series of research studies conducted under the auspices of the Newspaper Readership Project, an industry-wide effort to promote circulation and readership.

May 1984

NATIONAL STUDY OF THE DAILY NEWSPAPER AND ITS AUDIENCES

PREFACE

In May 1982, the Newspaper Advertising Bureau designed and carried out a nationwide survey of the readership of daily newspapers. The field work was conducted by Audits & Surveys, Inc. with a probability sample of adults in 1,979 households. The questionnaires used in the interview covered a wide range of topics: newspaper reading, television viewing, exposure to news media, readers' content preferences, ratings of the performance of the daily paper, circulation patterns, and detailed demographic information.

As part of the interview, newspaper readers were also taken through a copy of the paper they read yesterday, or the one they usually read, and asked about their readership of or interest in specific editorial and advertising items on sampled pages in that paper. These items were coded in several ways: size, use of text or illustrations, location in the paper, etc.

Although daily newspapers throughout the United States share certain characteristics, each newspaper is a unique publication reflecting particular editorial policies and local conditions. No national overview of newspaper content can do justice to this uniqueness, but national surveys of content serve as useful benchmarks that may detect journalistic trends over time.

Similar national newspaper readership surveys conducted in 1971, 1977 and 1982 included a detailed analysis of the editorial content of selected pages in daily newspapers. The basic purpose of the selection and weighting procedures used was to make these representative of all newspaper pages in circulation, excluding those on spreads that consist entirely of classified

advertising. Measurements taken on the entire base of sampled pages were limited to items of five column inches or more, including both advertising and editorial items.

The results of this survey are presented in a series of detailed reports dealing with circulation issues, news habits of the American public, page traffic and ad readership, attitudes about the performance of the daily press, and the content and readership of news and features. A separate technical report on the survey, prepared by Audits & Surveys, Inc., that contains copies of the questionnaires used in the study is also available.

This study was sponsored by the Newspaper Readership Project and carried out by NAB's Research Department.

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HIGHLIGHTS

1. The content of newspaper display advertising is as diverse as the products and services in the American marketplace. No one of the twenty-nine categories used in this analysis accounts for more than 9% of all display ads.

2. Reader traffic through the newspaper provides advertisers with excellent opportunities for exposure. The average page is opened by nearly four out of five readers. Factors like sex, age, education and income have little effect on page opening levels.

3. Seven out of ten ads are less than a quarter of a page in size, but national ads are substantially larger than retail ads.

4. As shown in previous research, reported ad reading varies with both interest in the product and the size of the ad. National ads, being larger, get above average readership.

5. An ad's chances of being read are not significantly affected by position within the paper or placement on the page. The presence of other ads on the same page may actually boost readership.

6. Both readership and interest in advertising varies by product category. Women respond to more ads than men do, reflecting the greater volume of advertising addressed to them.

DETAILED FINDINGS

Broad Variety of Newspaper Display Ads

One of the most striking characteristics of the daily newspaper as a medium is its universality, as demonstrated not only by its widespread readership among different population groups, but also by its wide range of editorial content.* This diversity is also reflected in newspaper R.O.P. display advertising, which is scattered across a wide array of products and services, as Table 1 shows. The largest single category of ads, numerically, is movies and entertainment, which accounts for 9% of the total. This reflects the multiplicity of small ads for individual theaters, and represents a substantially smaller proportion of the total display advertising space. Conversely, airline ads, which tend to be of larger than average size, represent only 1% of the total number, and supermarket ads account for 4%. It must be remembered that preprint advertising is not included in this study.

Ad Size, National and Retail, B/W and Color

Seven out of ten newspaper ads within the measured universe (5 column inches or larger) are less than one quarter of a page large, but these ads account for only an estimated one third of the total display advertising space. (Table 2). But 45% of the ad space is taken up by ads that are at least a half page in size, which represent only 14% of the total number.

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* Meeting Readers' Multiple Needs, Newspaper Advertising Bureau, 1984.

However, national and retail ads show a different pattern, as Table 3 shows. National ads account for only 9% of the total number of display ads, but they represent an estimated 19% of the total display advertising space.

Only 2% of daily R.O.P. display ads use color, but they account for 9% of all national ads and 1.5% of retail ads. In fact, 35% of the color ads are national ads. Table 4 shows that nearly half of all color ads are a full page or larger, and the average size is substantially greater than that of black and white ads, for obvious reasons.

Page Opening and the Opportunity for Ad Exposure

The opening of a spread by the newspaper reader creates the opportunity for every ad and editorial item on those pages to come to the reader's attention. (The page opening technique has been repeatedly validated by experimental studies using the "glue-spot" technique.) In our survey, page opening was measured for the front and back page of each newspaper in the sample, and for four other randomly selected spreads, excluding only those made up entirely of classified advertisements. (Front and back pages were oversampled to enrich the measurement of editorial matter, and were statistically reduced in weight to account for their proper proportion of total pages.) The methodology, originally developed in technical consultation with the Advertising Research Foundation, has been used in a series of studies conducted by Audits and Surveys for the Newspaper Advertising Bureau since 1963, and is fully described in a separate technical report.

As table 5 shows, nearly eight out of ten pages are opened by the average reader, and this proportion does not vary significantly among readers of different kinds. Spreads in thin papers get slightly higher

opening than those in thicker papers, which are more apt to have physically separate sections, in some cases appealing to specialized interests (Table 6). Since metropolitan newspapers have the largest numbers of pages and of separate sections, their page opening levels are somewhat less than those of smaller dailies (Table 7). However, when pages are categorized according to their dominant editorial content (Table 8) it is apparent that a substantial majority of them are opened regardless of their subject matter. The below average opening levels reported for certain kinds of pages, like those made up entirely of advertising, display or classified, may well represent an understatement reflecting a lower level of interest than there is in most types of news.

The Dimensions of Ad Readership

For every ad and editorial item of five column inches or larger, readers who said they had opened the spread were asked," Did you see or read any part of this?" It has long been understood that the noting or recognition scores that result from this type of question reflect readers' interests in what is advertised, or their response to the creative technique, and are a substantial understatement of what they actually look at (as measured by an eye camera record). Thus the actual percentages of reported noting are of less interest than the variations among different types of readers and ads.

Altogether, the average ad is reported as having been read by 16% of the readers who opened the page on which it appears. However this proportion ranges from 12% for ads of less than a quarter page to 44% for ads of a full page or more. (Table 9). National ads get scores that average higher (21%) than retail ads (15%), as Table 10 shows. However,

this comparison may be misleading, since the mix of advertised products and services, along with the corresponding variations in consumer interest, is different for national and retail ads. (This explains why the largest retail ads outperform the largest national ads; they are simply selling different things). In addition, more of the national ads are bigger ads. These qualifications must also be kept in mind in observing that color ads outperform black and white ads by two to one (Table 11). As we have already seen, color ads are larger, and advertise a different array of merchandise and services.

Ad Position and Readership

The reported level of readership does not differ between ads on left and right hand pages (Table 12), conforming to the findings of much previous research. Ads on back pages of sections, or of the newspaper, get higher scores than those on interior spreads, but there are only minor differences among the ads on pages closer to the front or to the back of the paper. (Table 13).

The presence of other ads on the same page appears to add rather than to detract from levels of readership, as Table 14 suggests. Among both men and women, ads that appear on pages that are half or less advertising get lower readership scores than ads on pages with over 50% advertising. Could this merely reflect the greater attention paid to larger ads? Even when ads of half a page or more are eliminated, it is apparent that the presence of other advertising is a plus. (It must be recalled that pages which contain predominantly editorial matter may tend to be more specialized in content, and may not be comparable in all respects to pages in which advertising predominates.)

Ad Readership and Reader Characteristics

Women report reading more ads (19%) on opened pages than men do (12%). This is in keeping with the findings of a long series of readership studies, and undoubtedly reflects the preponderant number of display ads that appeal to women consumers.

The difference between the sexes is apparent among readers of every age, but recognition scores are lower among older readers, as might be expected. (Table 15) Readers in families with different incomes have almost the same scores, (Table 16) but high school graduates show a slightly higher than average recognition of the typical ad. (Table 17).

Ad Readership by Product Category

It has already been mentioned that the nature of the advertised product or service can affect the attention given to an ad, because some items are inherently more interesting than others and because some items tend to be advertised in larger space units and also because some items tend to be advertised in color. These factors are reflected in the first column of Table 18, which shows the readership scores for ads in different product categories, among readers who opened the pages on which those ads appeared. Retail food advertising gets by far the highest reported readership. In fact the average food ad was reported as read by 46% of the women readers who had opened the page. (Separate statistics are not shown for all categories, because of the comparatively small number of ads measured in many of them).

As already described in an earlier report in this series,* interviews were conducted with most of the one-third of the original national probability sample who had not read a daily newspaper yesterday, as well as with the two-thirds who had. (The 10% who said they never read a paper were excluded). The non-readers were questioned in depth about the preceding day's issue of the particular daily paper that they said they would be most likely to read (or in the case of those few without a preference, a local daily selected at random). Like the readers, they were taken through four randomly selected spreads, plus the front and back pages (with the appropriate statistical weighting applied to eliminate bias). Since these non-readers could not be questioned about their prior readership of each editorial and advertising item on those pages, they were asked instead whether or not they were interested in it. The second column of Table 18 shows a variability in interest level, by product category, which is comparable to the variability in readership, although it is not exactly parallel for individual categories. For example, retail food advertising arouses only slightly more interest than readership, as does apparel advertising. However advertising for airlines, computers, jewelry and real estate creates proportionately far more interest among non-readers than reported readership among readers. Overall, the average item gets a level of interest which is nearly 50% higher than is recalled readership.

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* The Daily Newspaper: Readership and Content Technical Appendix. (Newspaper Advertising Bureau, 1984)

How Interest in Advertising Varies

We have already seen that national ads, partly because they are larger, get higher readership than retail ads, and the same results are found when non-reader interest scores are analyzed. The average national ad scores 33%, retail 22%. The effect of ad size is directly reflected in Table 19, which recaps the readership levels for ads of different sizes, and compares them with the interest levels among non-readers. It is apparent that larger ads arouse greater interest, even though, for a non-reader, the exposure opportunity is held constant. This merely vindicates the advertiser's common-sense judgment that when he buys a larger unit of space he not only has an opportunity to tell a more comprehensive story, but also has a better chance to maximize the exposure opportunity presented by the opened newspaper page.

Table 1

DISTRIBUTION OF ITEMS ON OPENED PAGES

(by product category)

Airlines	115	1%
Alcoholic beverages	197	1
Automotive (not parts)	716	4
Automotive parts/services	678	4
Building materials/construction	626	4
Women's clothing	790	5
Men's clothing	396	2
Child/non specified clothing	366	2
Computer/video games	199	1
Farm & garden	130	1
Financial	380	2
Food/drugs/household supplies/pet supplies	973	6
Hotel/resort	184	1
Household appliances	378	2
Household furniture and furnishings	1,268	8
Jewelry/chinaware/toiletry/luggage/leather goods	496	3
Movies/entertainment	1,516	9
Photo/camera supplies	160	1
Publishing/media	862	5
Real estate	221	1
Restaurant/fast food chains	1,025	6
Supermarket/other food stores	597	4
Tobacco/smoking	254	2
TV/radio/stereo/tapes/records	401	3
Legal notes/professional services/education	770	5
Sport/sports equipment/physical fitness	618	4
Domestic/local business	524	3
Omnibus	547	3
All other	1,218	7
TOTAL	16,605	100%

(Based on pages opened by yesterday newspaper readers.)

Table 2

NUMBER OF ADS ON OPENED PAGES

(by size of ad)

Size of Ad	Unweighted base	Percent of total	Estimated percent of total ad space*
Less than one-quarter page	11,569	70%	33%
One-quarter to less than half page	2,639	16%	22%
Half to less than full page	1,377	8%	23%
Full page or more	1,020	6%	22%
Total	16,605	100%	100%

* Ads that are less than one quarter page carry a weight of 0.13.

Ads that are one quarter to less than half page carry a weight of 0.38.

Ads that are half to less than full page carry a weight of 0.75.

Ads that are full page or more carry a weight of 1.

Based on pages opened by yesterday newspaper readers.

Table 3

NUMBER OF RETAIL AND NATIONAL ADS ON OPENED PAGES

(by size of ad)

Size of Ad	Retail		National		Total	
Less than one-quarter	11,036	73%	533	36%	11,569	70%
One-quarter to less than half page	2,254	15%	385	26%	2,639	16%
Half to less than full page	1,092	7%	285	20%	1,377	8%
Full page or more	762	5%	258	18%	1,020	6%
	15,144	100%	1461	100%	16,605	100%
Total	(91%)		(9%)		(100%)	

Based on pages opened by yesterday newspaper readers.

Table 4

NUMBER OF BLACK & WHITE AND COLOR ADS ON OPENED PAGES

(by size of ad)

Size of Ad	Black & White		Color		Total	
Less than one-quarter	11,537	71%	32	9%	11,569	70%
One-quarter to less than half page	2,572	16%	67	20%	2,639	16%
Half to less than full page	1,300	8%	77	23%	1,377	8%
Full page or more	856	5%	164	48%	1,020	6%
	16,265	100%	340	100%	16,605	100%
Total	(98%)		(2%)		(100%)	

Based on pages opened by yesterday newspaper readers.

Table 5

PERCENT OPENING AVERAGE PAGE

Total yesterday readers		77%
By sex:	Male	75
	Female	79
By age:	18-24 years	75
	25-34 years	75
	35-44 years	77
	45-54 years	80
	55-64 years	78
	65 years or older	78
By education:		
	College graduate	77
	1-3 years college	76
	High school graduate	79
	Some high school or less	74
By household income:		
	$35,000 & over	75
	$25,000-$34,999	76
	$15,000-$24,999	77
	$10,000-$14,999	79
	Under $10,000	78
By locality type:		
	Central city	76
	Suburb	77
	Non-metropolitan	78

Base: Qualified yesterday readers = 100%

Table 6

AVERAGE PAGE OPENING BY NUMBER OF PAGES IN NEWSPAPER[a]

Number of Pages in Newspaper	Average Page Opening[b]	
	Percent	# of Pages
24 or less	83%	20
25 - 40	78%	25
41 - 60	76%	38
61 & Over	74%	59

Base: Qualified yesterday readers.

[a]Excludes those pages that consist entirely of classified advertising.

[b]Estimates based on the following multiples: for 24 pages or less, 24; for 25-40 pages, 32; for 41-60 pages, 50; for 61 pages and over, 80.

Table 7

PERCENT OPENING AVERAGE PAGE BY CIRCULATION

Over 250,000	72%
100,000 - 250,000	72%
25,000 - 100,000	81%
Under 25,000	82%

Base: Qualified yesterday readers.

Table 8

PERCENT OPENING AVERAGE PAGE BY TYPE OF PAGE

		(Base)
General news	83%	(4597)
Women's Pages (TOTAL)	75%	(905)
Food	65%	(151)
Fashion	84%*	(24)
Society	86%	(130)
Men's Pages (TOTAL)	71%	(1901)
Business/Finance	68%	(473)
Sports	71%	(1428)
Editorials	80%	(499)
Obituaries	79%	(116)
Classified	62%	(266)
Radio/TV	74%	(172)
Comics	80%	(254)
Amusements	79%	(692)
Home/Garden	57%	(61)
Columnists	76%	(206)
Advertising only	67%	(1467)
Agriculture/Farm	82%*	(27)
Health/Science	88%	(64)
Area/Local News	82%	(1024)
Other	71%	(52)

* Base small. Shown for completeness only.

Table 9

PERCENT OF ADS READ ON OPENED PAGES

(by size of ad)

Less than one-quarter page	12%
One-quarter to less than half page	17%
Half to less than full page	25%
Full page or more	44%
Average for all ads	16%

Table 10

PERCENT OF RETAIL AND NATIONAL ADS READ ON OPENED PAGES

(by size of ad)

Size of Ad	Retail	National
Less than one-quarter page	12%	15%
One-quarter to less than half	17%	19%
Half to less than full page	25%	26%
Full page or more	48%	33%
Average for all ads	15%	21%

Table 11

PERCENT OF RETAIL AND NATIONAL ADS READ ON OPENED PAGES

(by color of ad)

	Black & White	Color
Retail	15%	33%
National	21%	29%
Average for all ads	15%	31%

Table 12

PERCENT OF ADS READ ON OPENED PAGES*,
LEFT VS RIGHT-HAND PAGE, BY SEX

Sex of reader	Left hand	Right hand
Male	12%	11%
Female	19%	19%
Total Adults	15%	15%

* Ads only on interior spreads were tabulated. Totals do not include ads larger than a full page.

Table 13

PERCENT OF ADS READ ON OPENED
PAGES BY LOCATION IN NEWSPAPER

(by sex)

	Male	Female	Total Adults
Back page	25%	23%	24%
Average interior spread	12%	19%	15%
First interior spread	11%	17%	14%
Second interior spread	10%	18%	14%
Third interior spread	14%	20%	17%
Fourth interior spread	11%	21%	16%
First page of section	6%	14%	11%
Back page of section	19%	24%	22%

Table 14

PERCENT OF ADS READ ON OPENED PAGES BY AD CONTENT OF PAGE

(by sex)

	Male	Female	Total adults
Ad content 50 % or less	8%	14%	11%
Ad content over 50%	14%	22%	18%
(ads of half-page +)	*	*	15%

* Not available

Table 15

PERCENT OF ADS READ ON OPENED PAGES BY AGE

(by sex)

Age	Male	Female	Total Adults
18 - 24	11%	24%	18%
25 - 34	11%	20%	16%
35 - 44	14%	21%	18%
45 - 64	14%	16%	15%
65 and over	9%	17%	13%
Total	12%	19%	16%

Table 16

PERCENT OF ADS READ ON OPENED PAGES BY ANNUAL FAMILY INCOME

Income	Total Adults
$35,000 or more	16%
$25,000 - $35,000	16%
$15,000 - $25,000	16%
$10,000 - $15,000	13%
Under $10,000	14%

Table 17

PERCENT OF ADS READ ON OPENED PAGES BY EDUCATION

Education	Total
Adults	
College graduate or higher	13%
Some college	15%
High school graduate	18%
Less than high school graduate	14%

Table 18

AD PERFORMANCE BY PRODUCT CATEGORY

PERCENT OF ADS READ ON OPENED PAGES

(By Readers, and Percent "Interested" in Ads on Comparable Pages, by Non-Readers)

	Reading (Readers)	Interest (Non-Readers)
Average for all ads	16%	23%
Airlines	24%	40%
Alcoholic beverages	12	15
Automotive (not parts)	16	24
Automotive parts/services	11	19
Building materials/construction	7	16
Women's clothing	19	22
Men's clothing	15	17
Child/non specified clothing	14	28
Computer/video games	8	20
Farm & garden	10	18
Financial	12	29
Food/drugs/household supplies/pet supplies	12	23
Hotel/resort	15	15
Household appliances	12	17
Household furniture and furnishings	16	23
Jewelry/chinaware/toiletry/luggage/leather goods	12	20
Movies/entertainment	18	29
Photo/camera supplies	16	13
Publishing/media	12	18
Real estate	6	17
Restaurant/fast food chains	15	20
Supermarket/other food stores	36	39
Tobacco/smoking	20	13
TV/radio/stereo/tapes/records	22	19
Legal notes/professional services/education	11	17
Sport/sports equipment/physical fitness	14	21
Domestic/local business	13	21
Omnibus	34	38
All other	16	20

Table 19

AD SIZE AND PERFORMANCE

(Percent of Ads Read on Opened Pages by Readers,
and Percent "Interested" in Ads on Comparable Pages,
by Non-Readers)

	Reading (Readers)	Interest (Non-Readers)
Double truck	40%	49%
Full page	37	42
Half page or more	31	25
Quarter-half page	28	17
Less than quarter page	20	12